

Article Title: How to Upload a Document

Issue: Add a document to a claim or contract

Resolution:

To upload a document to a contract or claim, complete these steps:

1. For an active claim and from the Claim screen, click the **Actions** tab, located on the right side. If no active claim, from the Contract screen, click the **Actions** tab.
Result: The actions icon options will display.
2. Click the **Upload Document** button.
Result: The Upload Document screen displays.
3. Select the appropriate document from the Document Type drop-down menu.
Result: The Document Type field is populated with the type of document to upload.
4. There are 2 methods to select a file for upload. Select the appropriate option to upload the document:
 - A. Upload from computer's saved files - click the **Upload File** link to locate the file saved on the computer. Proceed to step 5.
Result: The computer files screen displays.
 - B. Drag and drop method – Navigate to the location the document is saved on the computer and click the document name once and drag it to the **Or drop files** field. Click the **Done** button on the confirmation box Proceed to step 6.
Result: The Document title is listed below the Document Type field.
5. Locate the file to upload and either double-click the file or highlight and click the **Open** button.
Result: The Document title is listed below the Document Type field.
6. Click the **Next** button and then next again to the Status page.
Result: Document uploads to the claim or contract.

Please note: There is an alternate method to upload documents into CMS. For second option, please refer to page 4 of SOP: [How to Upload Documents Claims CSR](#)

Related References and Documents:

SOP: How to Upload Documents_Claims_CS

Purpose

This SOP is intended to outline how to upload a document into Salesforce.

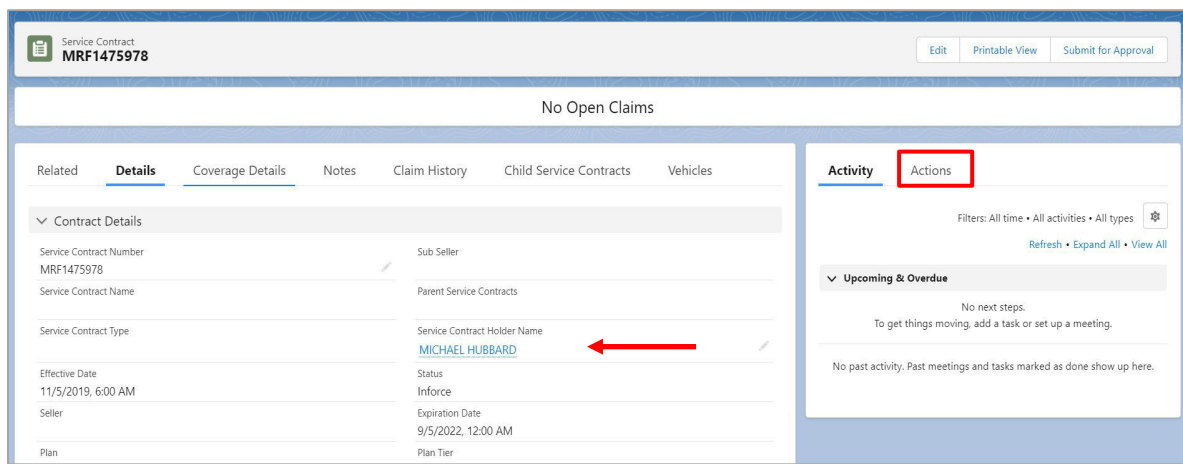
Teams Impacted

- Customer Service
- Claims

Procedure

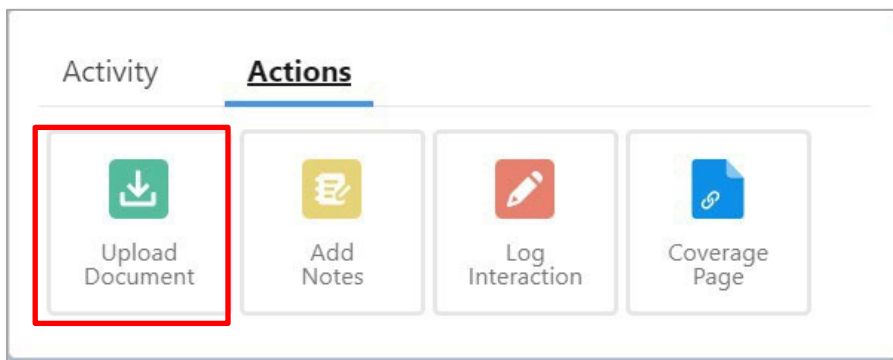
Once the contract holder's information is verified, follow these steps to upload a document.

1. From the Main Claim screen, click the Actions tab, located on the right side of the screen.



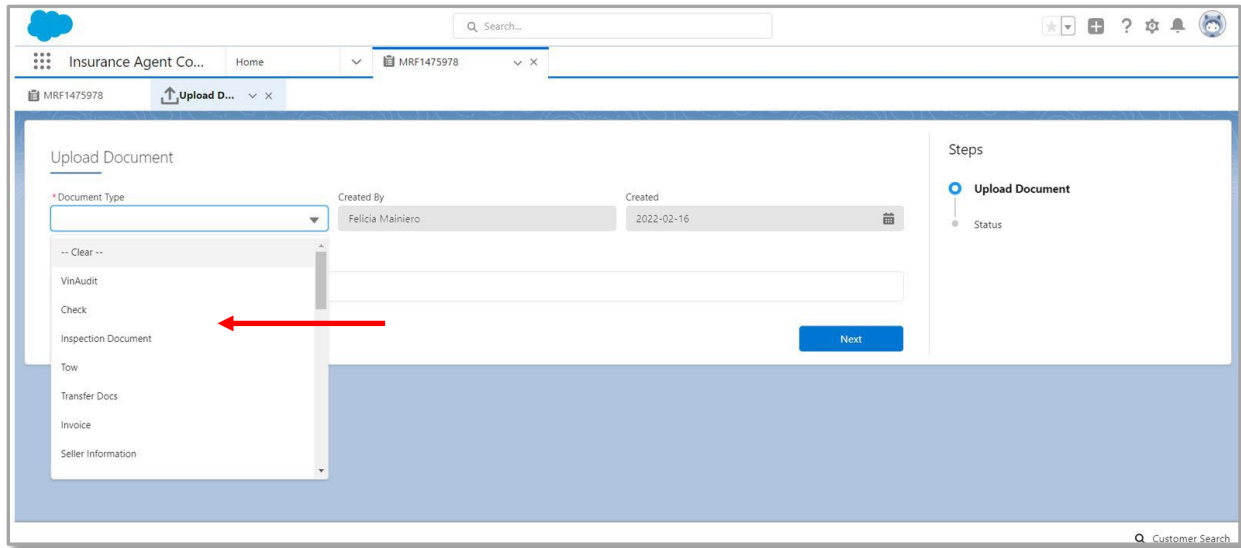
Result: The available Action button displays.

2. Click the **Upload Document** button.



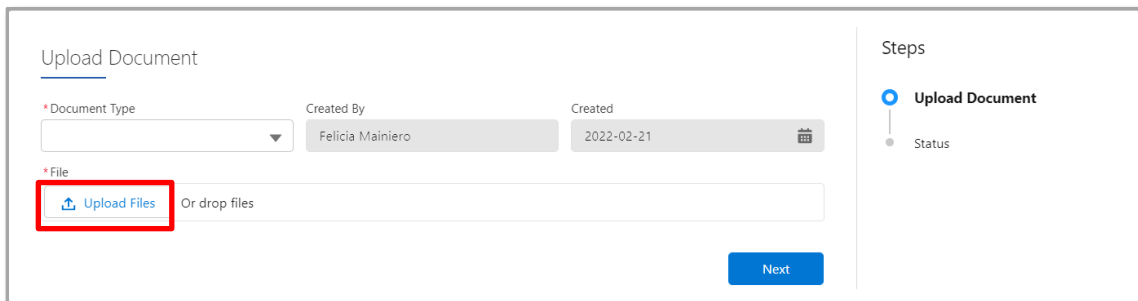
Result: The Upload Document screen displays.

3. Select the appropriate document from the **Document Type** drop-down menu.



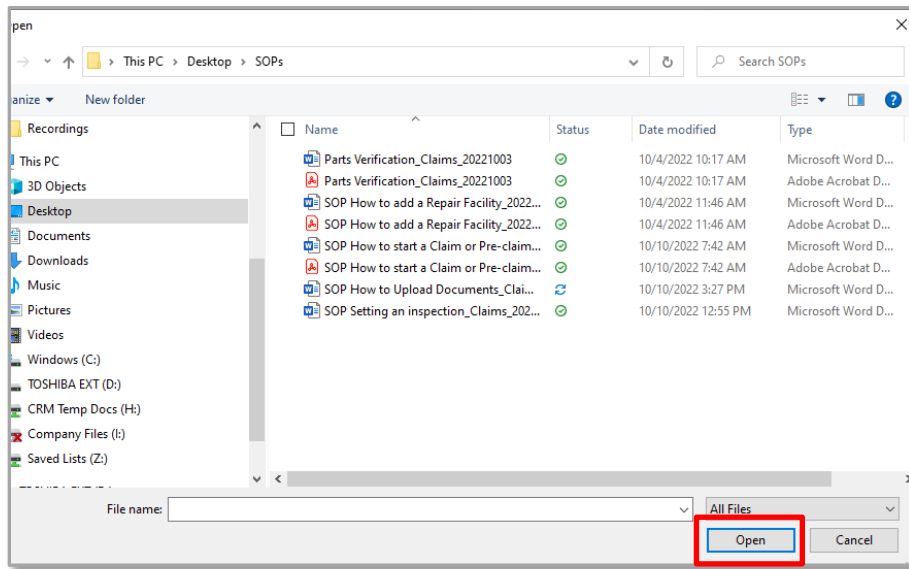
Result: The Document Type field is populated with the type of document to upload.

4. Click the **Upload File** link to locate the file saved on your computer.

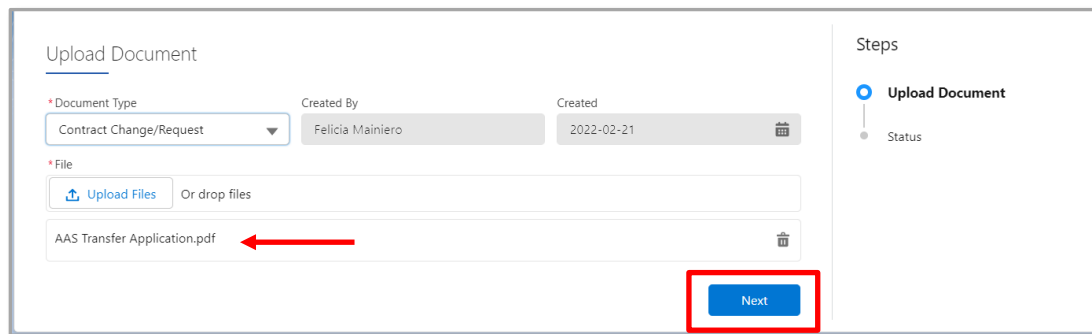


Result: Your computer files screen displays.

5. Locate the file to upload and either double-click the file or highlight and click the **Open** button.



Result: The Document title is listed below the Document Type field.



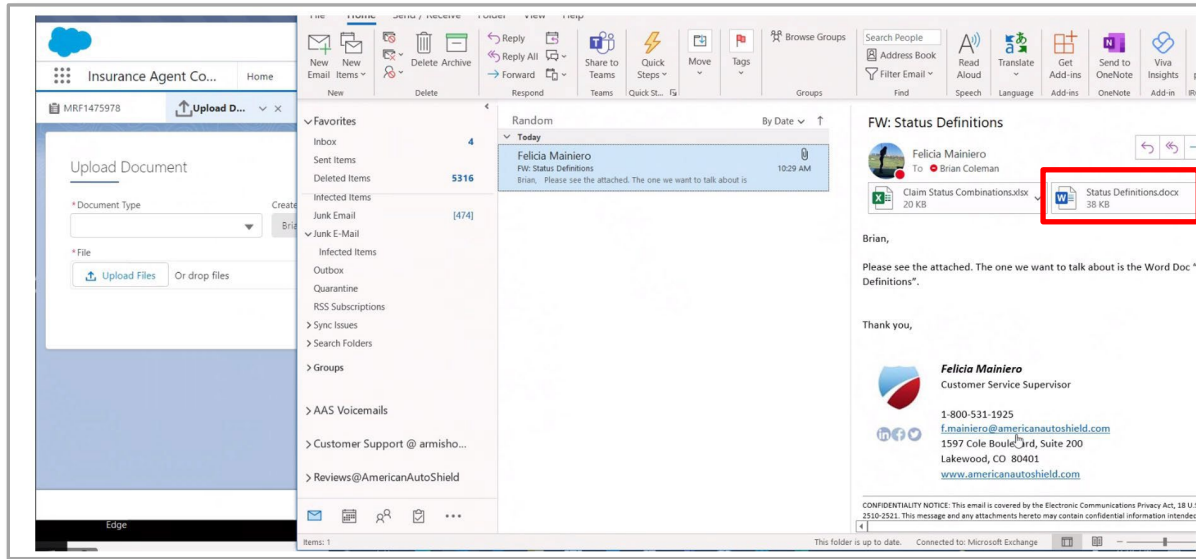
The screenshot shows the 'Upload Document' form. The 'Document Type' dropdown is set to 'Contract Change/Request'. The 'Created By' field shows 'Felicia Mainiero' and the 'Created' date is '2022-02-21'. The 'File' section shows a list of uploaded files, with 'AAS Transfer Application.pdf' highlighted by a red arrow. The 'Next' button is highlighted with a red box.

6. Click the **Next** button.

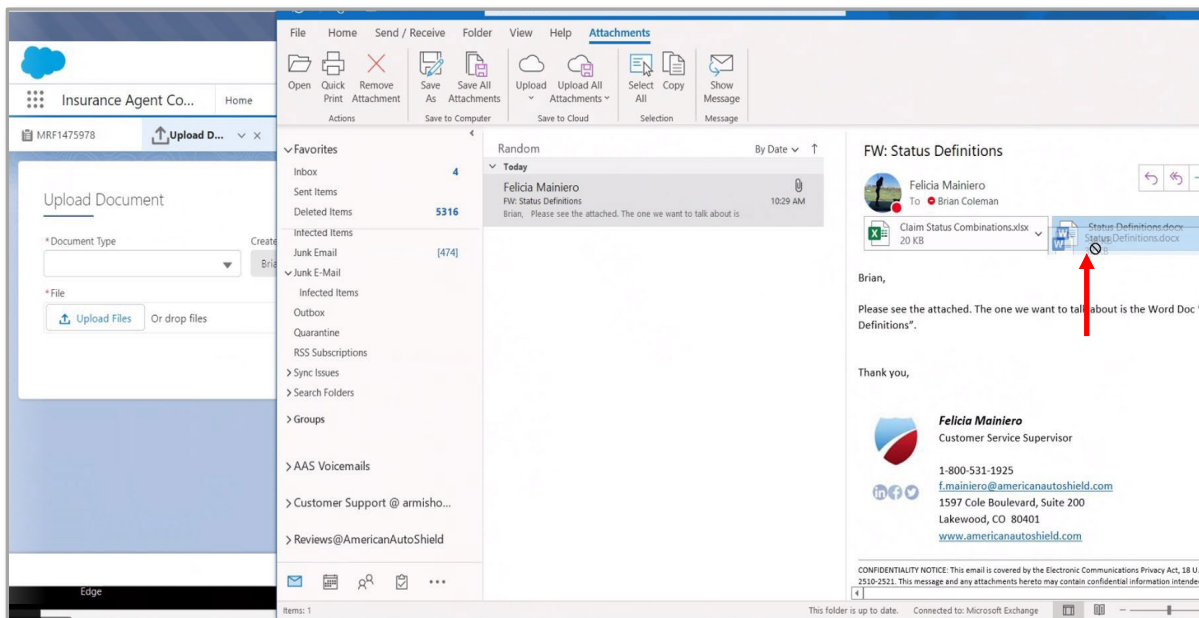
SOP: How to upload a document

The second option for uploading a document is to use the “drag and drop method.”

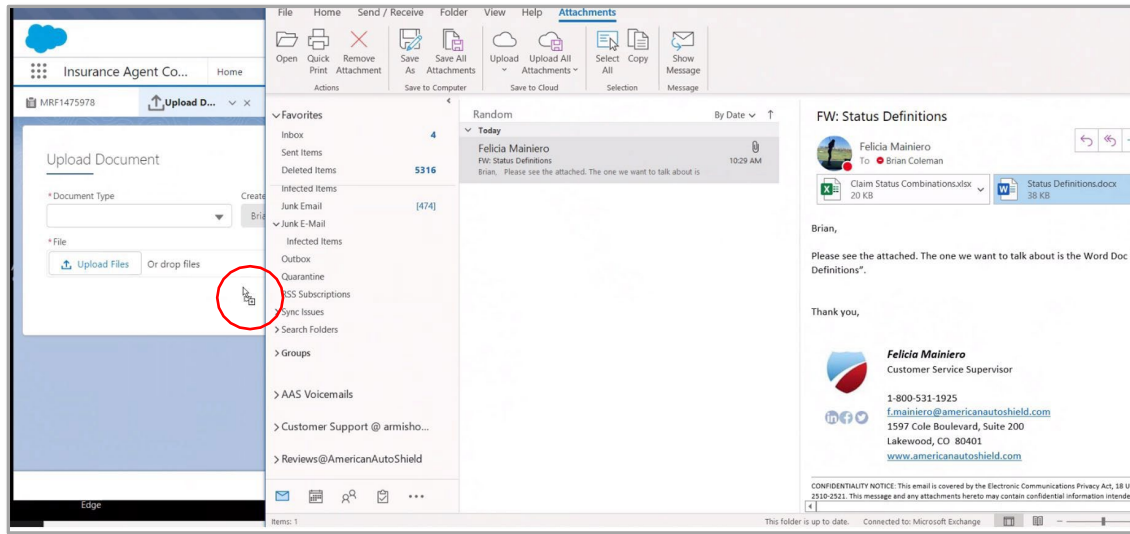
1. From the contract holder Main Claim screen, click the Action tab.
2. Select the appropriate document from the **Document Type** drop-down menu.
3. Go to the location the document is stored on your computer, click the document name once and drag it to the ‘Or drop files’ field.



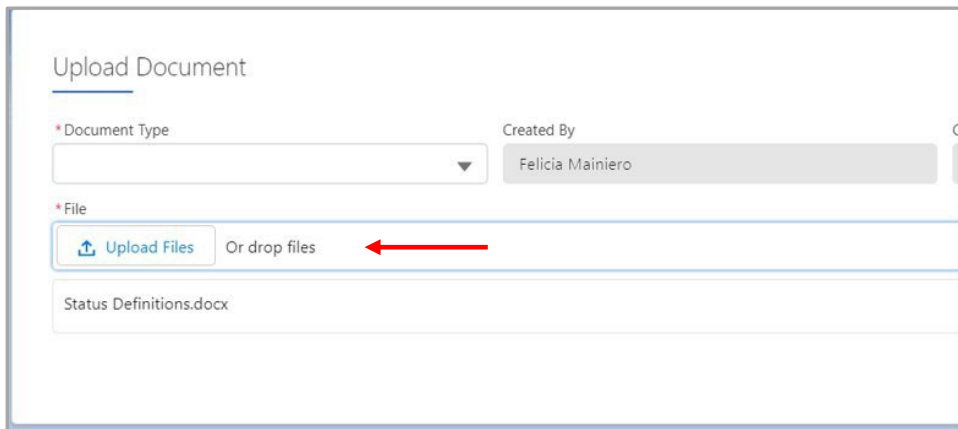
Note. When you drag the document, your cursor will appear as a black circle.



4. Once you are at the “Upload document” screen your cursor will appear as normal.



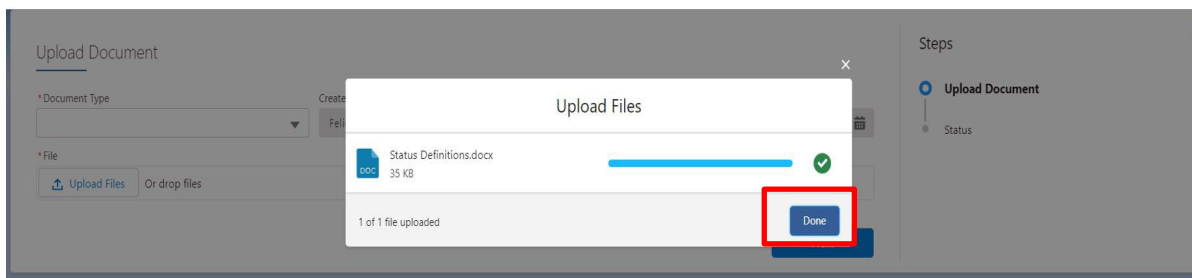
5. When you are ready to drop the document, make sure your cursor goes in the ‘Or drop files’ section.



6. When you successfully dropped the file, click the **Next** button.

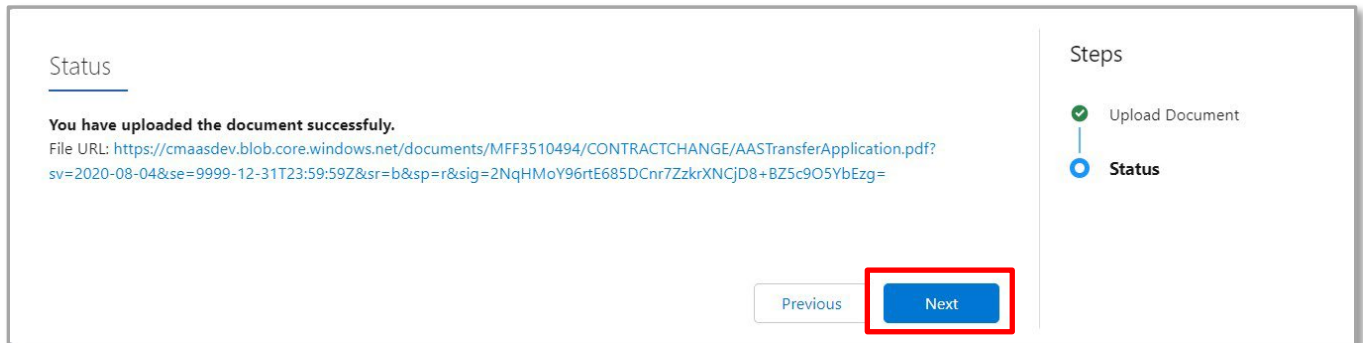
Result: A confirmation box confirms the documents uploaded to CMS.

7. Click the **Done** button.



Result: The Status page displays with the status of the uploaded document.

8. Click the **Next** button.



Status

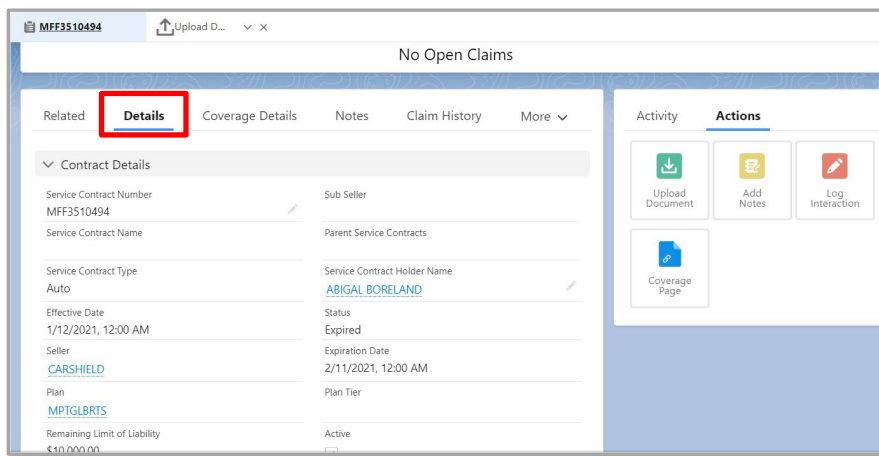
You have uploaded the document successfully.
 File URL: <https://cmaasdev.blob.core.windows.net/documents/MFF3510494/CONTRACTCHANGE/AASTransferApplication.pdf?sv=2020-08-04&se=9999-12-31T23:59:59Z&sr=b&sp=r&sig=2NqHMoY96rtE685DCnr7ZzkrXNCjD8+8Z5c9O5YbEzg=>

Previous **Next**

Steps

- Upload Document
- Status**

Result: The Main Contract page displays.



MFF3510494 Upload D... x

No Open Claims

Related **Details** Coverage Details Notes Claim History More ▾

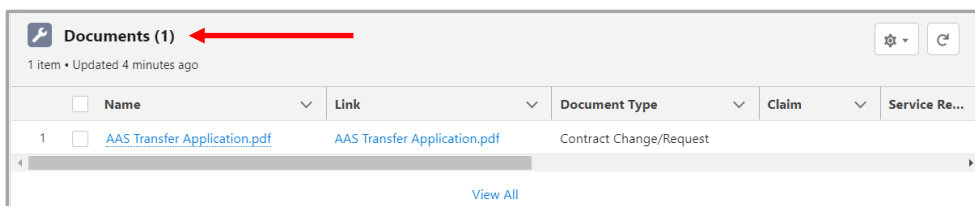
Contract Details

Service Contract Number MFF3510494	Sub Seller
Service Contract Name	Parent Service Contracts
Service Contract Type Auto	Service Contract Holder Name ABIGAL BORELAND
Effective Date 1/12/2021, 12:00 AM	Status Expired
Seller CARSHIELD	Expiration Date 2/11/2021, 12:00 AM
Plan MPTGLBRIS	Plan Tier
Remaining Limit of Liability \$10,000.00	Active

Activity **Actions**

- Upload Document
- Add Notes
- Log Interaction
- Coverage Page

9. To view the uploaded document, click the **Related** tab, and scroll until you see the document



Documents (1) ←

1 item • Updated 4 minutes ago

	Name	Link	Document Type	Claim	Service Re...
1	AAS Transfer Application.pdf	AAS Transfer Application.pdf	Contract Change/Request		

[View All](#)

Approval & Revision

Date Created 2/15/2022	Created By Felicia Mainiero		Date Approved 2/24/2022	Approved By Brian Coleman
Date Revised 10/10/2022	Revised by Kara Ness	Revision Description Edited for format, grammar, spelling and readability.	Date Approved 10/10/2022	Approved By Kara Ness
Date Revised 08/01/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/01/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]